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<b>Report To:</b>	<b>Policy &amp; Resources Committee</b>	<b>Date:</b>	<b>17 September 2019</b>
<b>Report By:</b>	<b>Chief Financial Officer</b>	<b>Report No:</b>	<b>FIN/83/19/AP/FM</b>
<b>Contact Officer:</b>	<b>Fiona Maciver</b>	<b>Contact No:</b>	<b>01475 712904</b>
<b>Subject:</b>	<b>Customer Services Annual Performance Update</b>		

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## 1.0 PURPOSE

- 1.1 The purpose of this report is to provide the Committee with an update of Customer Service Centre (CSC) performance for 2018/19 and to provide an update on the Action Plan which has been an evolving document since the first CSC Strategy was approved in 2012.

## 2.0 SUMMARY

- 2.1 Following the opening of the Customer Service Centre (CSC) in the summer of 2012, the Policy & Resources Committee approved its first Customer Services Strategy in November 2012. This Strategy was refreshed in September 2015 and again in 2018 for 2018-21. It was also agreed that an annual update of CSC performance would be presented to the Committee.
- 2.2 Since last year's performance report a restructure has taken place in Revenues and Customer Services due to the planned retirement of the Revenues Supervisor in April 2019. The Benefits Team Leader took on responsibility for Revenues whilst Registration Services was transferred to Customer Services, all still reporting to the Revenues and Customer Services Manager. More detail on this restructure can be seen in at paragraph 4.2 of this report.
- 2.3 Appendix 1 details progress against the action plan presented to the Committee in September 2017 and Appendix 2 provides performance information for 2018/19 as compared to 2017/18 in terms of volumes and throughput. Overall the level of performance in Revenues and Benefits has improved and exceeded the target set last year. Performance in non-Revenues and Benefits service areas has remained fairly stable with a slight improvement; more information relating to performance can be seen at Section 6 of this report.
- 2.4 Improvement can also be seen in 3 out of 4 of the service areas monitored under the Quality Assessment procedure with one area remaining static. More information relating to this performance can be seen at Section 6 of this report.
- 2.5 Section 7 of the report identifies targets for 2019/20 which are reported through the Corporate Directorate Improvement Plan and Inverclyde Performs. This section also outlines the challenges ahead including ongoing work to drive forward channel shift, partnership working with the Scottish Social Security Agency and developments in the pipeline for CSC staff to take on telephone booking appointments for the registration of marriages and deaths.

## 3.0 RECOMMENDATIONS

- 3.1 It is recommended that the Committee notes the performance in terms of the improvement in abandoned calls for Revenues and Benefits and for Quality outcomes and for the high level of compliments received.
- 3.2 It is recommended that the Committee notes the smooth transition of Registration Services merging with Customer Services.

3.3 It is recommended that the Committee notes the ongoing impact of Welfare Reform changes, particularly Universal Credit (UC), including the new Scottish Social Security Agency, on the workload/service delivery within the Customer Service Centre.

**Alan Puckrin**  
**Chief Financial Officer**

## **4.0 BACKGROUND**

- 4.1 The Policy & Resources Committee approved its first Customer Services Strategy in November 2012 following the opening of the Customer Service Centre in Clyde Square. This Strategy is refreshed on a triennial basis with the most recent being approved by the Committee in September 2018 for 2018-2021. When the initial Strategy was presented to the Committee in 2012 it was agreed that a report on Customer Service performance be presented to the Policy and Resources Committee on an annual basis after the Summer recess. As well as performance, the report also highlights areas of development that have been or are being introduced to ensure continued improvement.
- 4.2 Since last year's performance report a restructure has taken place in Revenues and Customer Services due to the planned retirement of the Revenues Supervisor in April 2019. The Benefits Team Leader took on responsibility for Revenues whilst Registration Services was transferred to Customer Services, all still reporting to the Revenues and Customer Services Manager. In the lead up to this change together with shared learning and knowledge transfer.

## **5.0 2018/19 PERFORMANCE AGAINST THE ACTION PLAN**

- 5.1 In 2018 together with the Customer Services Strategy the updated Action Plan which details current and future developments for the Service was presented to the Committee. This Action Plan has been updated to show the current position; Appendix 1 refers and shows:
- 2 x Blue (completed actions)
  - 5 x Green (on-track actions)
  - 1 x Amber (slippage)
- 5.2 One of the key successful completed actions from the 2018 Action Plan was:
- 'The transfer of Registration Services to Customer Services'; detail of which can be seen at paragraph 4. A new action relating to Registration Services has been added to the plan for CSRs to take on the task of taking telephone calls relating to marriages and then deaths, telephone calls for births have already been successfully transferred to CSRs. Progress on this will be reported in next year's performance report.
- 5.3 The Action Plan is an evolving document and as such new actions are added or adjusted depending on the direction of travel.

An example of this is in relation to the Scottish Social Security Agency (SSSA) which in 2018 was to:

'Keep abreast of developments in relation to the Scottish Social Security Agency'; Since this action was added to the Plan in 2018, the SSSA have agreed that they will have a team of up to 4 members of staff co-located in the CSC; chargeable costs have been agreed and ICT and equipment requirements have been identified and a Health and Safety Risk Assessment completed. Co-location in the CSC will allow customers to access Council and SSSA services in the one location with Health and Social Care Services also being available in nearby Hector McNeil House. More detail about the SSSA can be seen later in the report.

- 5.4 The action on the 2018 Action Plan relating to Service Development/Self Service which, when implemented will allow for an increased range of services such as Bulky Uplifts to be booked and paid for on line, has slipped in terms of its planned go live date due to technical difficulties which are currently being resolved. It is anticipated that on line self service will be live from late autumn this year starting with Bulky Uplifts followed by Street Lighting. Promotion of these services through the use of media and encouragement by the Customer Service Representatives during phone calls and face to face visits to the CSC will be key if we are to see a shift in the channel of contact for our customers and allow the new target described at paragraph 7.1.

## 6.0 2018/19 PERFORMANCE

- 6.1 Appendix 2 contains a comparison of performance for Revenues & Benefits (R&B) enquiries for 2018/19 against the same period for 2017/18 for telephony, customers interviewed and incoming emails. The Management Information (MI) illustrates that call volumes have reduced by 15% with the abandoned call levels improving from 25% in 2017/18 to 18% in 2018/19 which is well within the target of 20%. This is a credible performance given that the team lost 3 experienced members of the Revenues and Benefits team at the end of 2018 and, whilst the subsequent vacancies were filled, it took a few months of intensive training before the new advisors were as effective.
- 6.2 The average time that customers had to wait for their call to be answered in 2018/19 improved from just over 2 minutes in 2017/18 to just under a minute in 2018/19. The number of customers interviewed decreased by 3% in 2018/19 compared to a 12% reduction in 2017/18. It had been expected that this figure would continue to drop year on year as Universal Credit rolls out however the delays to the planned migration of UC means that the Housing Benefit caseload is not reducing at the rate predicted. UC migration is now not expected to be fully rolled out until 2024.
- 6.3 Appendix 2 also contains a comparison of performance for Other Council Services from 1 April 2018 to 31 March 2019. This shows:
- The abandoned call level has improved slightly from 7% in 2017/18 to 6% in 2018/19 with performance being within the target of 7%.
  - The number of overall calls presented has dropped slightly by 7%.
  - General enquiry emails decreased by 26% and total contact for general enquires reduced by 7%. The reason for this is not clear; it is possible that this is a result of services performing more efficiently for example bin uplifts etc. resulting in less need to contact the Council.
  - Usage of the mobile app and website has decreased by 22% since the 2018 performance was reported. Reduction in the usage of the mobile app could partly be attributed to technical problems with Apple meaning that Apple phone users have been unable to use this app since August 2018. Apple are looking at this issue together with the Council's software company however there is no information available at this time to know if this is likely to be resolved.

Management Information in the above areas will continue to be closely monitored.

- 6.4 Targets are set for the CSC in respect of volumes of complaints and compliments; the target for 2018/19 was based on the outturn for 2017/18. The target for last year was that the CSC was to receive no more than 20 complaints and to receive in excess of 63 compliments. The outturn for 2018/19 was that 20 complaints and 96 compliments were received. The nature of the complaints varies with no emerging theme; the high number of compliments received continues to be testament to the knowledge and professionalism of the CS staff.
- 6.5 Whilst it is disappointing to see that the number of customers using electronic means of contact such as the mobile app remains small, it is anticipated that when self service is available for customers to, for example, book and pay for bulky uplifts online together with developments underway as part of the Digital Strategy to implement Revenues Citizens Access and the roll out of MyAccount that this will help drive the shift to more digital channels of contacting the Council.
- 6.6 It was reported to the Committee in September 2018 that the Quality Monitoring System had been implemented following technical difficulties. This system and subsequent quality checks are now embedded into the service and provides valuable information on the performance of the Customer Service Representatives (CSR).
- 6.7 The process involves a Senior CSR listening into a percentage of calls. A scoring matrix is applied to give an overall score for each advisor. Templates have been developed for each of the key areas and for the key services. The elements that are scored on will vary depending on the

service however the following summarises the key areas that are scored:

- Did the CSR apply the correct greeting and offer further assistance at the end of the call?
- Did they apply the standard verification protocols?
- Did they access the correct record?
- Did they sound friendly, polite and interested in helping?
- Did they deploy effective listening and effective questioning skills to gather further information avoiding the use of jargon?
- Was the customer given correct advice, guidance and/or issued the correct forms as appropriate?
- Were the appropriate systems updated?
- Were the correct procedures followed when transferring a call?

6.8 Various parameters can also be monitored such as handling times of calls over or under certain duration. The Senior CSR provides one to one feedback to the CSR on their performance and ensures that feedback is positive where merited as well as highlighting areas where improvements can be made.

6.9 The quality assessment of telephone calls is broken down into four areas: Revenue & Benefits, Environmental & Public Protection, Taking a Payment and Switchboard calls. These four areas look for different outcomes and are assessed independently of each other. The results for 2018/19 showed that the high level of performance in its first year of performance in 2017/18 has been exceeded in 2018/19 in 3 of the 4 areas and remained static in one; the accuracy results are:

- Revenue & Benefits – 89% (81% in 2017/18)
- Environmental & Public Protection – 87% (87% in 2017/18)
- Taking a Payment – 94% (90% in 2017/18)
- Switchboard – 93% (90% in 2017/18)

6.10 Reducing the volume of cash payment continues to be a focus for the CSC; in 2017/18 there were 27,758 cash transactions which amounts to 57% of all transactions. In 2018/19 this reduced to 24,689 transactions which amounts to 53% of all transactions. It will be difficult reducing this figure much further without closing down cash payments as an option but it is acknowledged that due to the demographics in Inverclyde many customers particularly the elderly like to pay in cash. When web-self-service is live it is hoped that this may reduce cash transactions further.

6.11 The late opening on a Wednesday morning continues to be of benefit for staff training and development.

## **7.0 FUTURE PLANS AND TARGETS**

7.1 Customer Services targets for 2019/20 have been agreed as:

- To have fewer than 20% abandoned R&B telephone calls – no change from last year.
- To have fewer than 7% abandoned general calls – no change from last year.
- To receive no more than 20 complaints – 20 were received in 2018/19 compared to 14 received in 2017/18.
- To receive in excess of 70 compliments – 96 were received in 2018/19 compared to 81 in 2017/18.
- To have 10% of interactions with the Council without intervention at the CSC by utilising the web or mobile app for self-service in respect of general enquiries and service requests.

7.2 Channel Shift continues to be a key priority for the Service and the following actions will help facilitate this:

- Work with suppliers to fully enable the functionality for customers to book and pay for

- bookable and transactional services such as bulky uplifts.
- Enhance the range of services available via Web Self-service, including integration of MyAccount authentication which would allow one secure sign in.
- Review and revise the range of services available via the Inverclyde Online smartphone app and continue to improve back end processes and more widely promote this channel of contact.
- Work with suppliers to enable Council Tax account administration such as reporting changes in circumstances via the Council web site.

7.3 Progress on the above channel shift actions is monitored through the Finance/ICT meetings which are chaired by the Chief Financial Officer and is also tracked through the Digital Strategy Action Plan as well as the Customer Service Action Plan. These projects as noted earlier in the report have been subject to slippage but are on track to go live by the end of September.

7.4 The CSC has continued to enjoy successful outcomes through the placement of Modern Apprentices (MA). Working in the CSC gives young adults a wealth of experience as well as confidence through dealing with different types of customers on the telephone and face to face. The CSC has proven history of developing MAs enhancing their employment opportunities within and external to the Council. In 2018/19 two MAs secured positions as Customer Service Representative (CSRs) in the CSC. As well as it being of great benefit for the individuals receiving training and mentoring throughout the MA process enhancing their chances of employment, the CSRs and senior CSRs are delighted to see results of their investment. The Service is waiting on word as to whether a MA is to be allocated to a placement in the CSC from this year's intake.

7.5 Welfare Reform continues to have an impact on the volume and nature of contacts with the Customer Service Centre. The pace of this change will increase over coming years as Universal Credit begins its migration of the current Housing Benefit case load to UC albeit the pace of change has slowed down with full migration now not expected to be complete until 2024. The effect of UC will continue to be closely monitored.

7.6 It was reported to the Committee last year that when the appropriate systems were in place, Customer Service staff would be trained in taking registration telephone calls for customers wishing to make appointments, allowing the registration staff to concentrate on delivering the service. Whilst the software is not yet in place to allow the full roll out of all calls, Customer Service staff have been taking telephone calls in relation to the registration of births since June 2019 which has been a success. Following further training in a modular basis and the appropriate booking software being implemented, the plan is to transfer the telephone calls regarding marriages and then death appointments. It is critical that this training is thorough due to the sensitivities and legislative requirements of registering births, deaths and marriages. Progress of this will be monitored through the CS Action Plan and reported to the Committee on next year's Performance Report.

7.7 Following Royal Assent of the Scotland Act 2016 in March 2016, the Scottish Social Security Agency (SSSA) was set up to deliver 11 Social Security Benefits which have been devolved to Scotland to deliver and which are currently administered by the UK Government. The timescales for the delivery of the devolved Benefits began with the top up to Carer's Allowance from summer 2018, Best Start Allowance then Funeral payments during 2019 with a phased roll out of the remaining benefits for full implementation by 2021.

7.8 The SSSA intend to employ staff locally and envisage them working within every local authority area with recruitment underway. Rather than replace local delivery arrangements, Scottish Government officials wish to build on what already exists through augmentation and support and acknowledge that partnership arrangements will be key to the new arrangements. As noted earlier in the report, the SSSA have agreed that they will have a team of up to 4 members of staff co-located in the CSC; chargeable costs have been agreed and ICT and equipment requirements have been identified and a Health and Safety Risk Assessment completed. It is expected that SSSA staff will be in place in the CSC by 2019; co-location in the CSC will allow customers to access Council and SSSA services in the one location with Health and Social Care Services also being available in nearby Hector McNeil House. Progress in this area will be monitored through the CSC Action Plan and by means of regular meetings with the SSSA and internal services in the Council.

7.9 The British Sign Language (Scotland) Act 2015 requires Councils to develop a British Sign Language Plan (BSL) for 2018/23; CS and Corporate front line staff have attended a BSL training course and an e-course will be released within the next 6 months. A survey is being issued next month to ask staff if they use BSL for work and/or personal use and if yes ascertain what level of qualification they hold. The staff Disability Forum will have reviewed the Equal Opportunities Form by the end of the year to establish if the wording for current and potential employees could be improved. The Council will have joined contact SCOTLAND-BSL by the end of the year which through the use of an online interpreting video relay service will allow a 3 way conversation between the deaf user, an online interpreter and a member of our staff. Progress on the BSL Plan is reported to the CMT.

## 8.0 CUSTOMER CONSULTATION

8.1 No customer consultation was carried out in 2018/19 however there are biannual citizens panel surveys which include customer service questions with the next one due in 2020; it is planned that questions will be included around the area of website self-service in order to gauge awareness of these channels and collect information about how customers have found the experience of utilising on line services.

## 9.0 IMPLICATIONS

### 9.1 Finance

Financial Implications: There are no financial implications arising from this report

One off Costs

Cost Centre	Budget Heading	Budget Years	Proposed Spend this Report £000	Virement From	Other Comments
N/A					

Annually Recurring Costs/ (Savings)

Cost Centre	Budget Heading	With Effect from	Annual Net Impact £000	Virement From (If Applicable)	Other Comments
N/A					

### 9.2 Legal

There are no legal implications arising from this report.

### 9.3 Human Resources

There are no direct HR implications arising from this report.

### 9.4 Equalities

There was a full equalities impact assessment carried out with the initial Customer Services Strategy which was updated as part of the refreshed CS Strategy presented to the Committee in 2018 and will be further refreshed when the Strategy is next refreshed in 2021.

Has an Equality Impact Assessment been carried out?

	Yes	See attached appendix
X	No	This report does not introduce a new policy, function or strategy or recommend a change to an existing policy, function or strategy. Therefore, no Equality Impact Assessment is required.

## 9.5 Repopulation

The provision of quality Customer Services to existing residents and potential residents plays a part in the retention and attraction of people to Inverclyde.

## 10.0 CONSULTATIONS

10.1 None

## 11.0 LIST OF BACKGROUND PAPERS

11.1 None



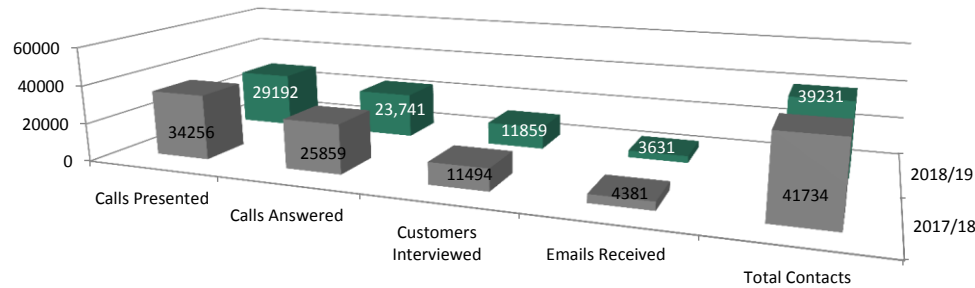
2018/21 Customer Services Strategy - Action Plan

Action	Action	Success Criteria	Target Date	Responsibility	August '19 Position	Status
PEOPLE	Training needs will be identified from quality checking and appraisals	<ul style="list-style-type: none"> <li>*Training programme in place</li> <li>*Better trained and confident staff.</li> <li>*Better customer satisfaction</li> <li>* Completion of CSPQ</li> <li>*Staff understand expectations allowing resources to be correctly targeted.</li> <li>*Service delivery meets management expectations</li> <li>*Customer Service visions and outcomes are agreed</li> </ul>	On-going	CS Team Leader/CS Supervisor	<ul style="list-style-type: none"> <li>* 15 CSC staff have completed or are in the process of completing their CSPQ</li> <li>* Await confirmation for funding to be available via Individual Training Accounts (ITA) for the remainder of the team to complete course.</li> </ul>	
	British Sign Language plan 2018 - 2023. Support Corporate Policy with the implementation	<ul style="list-style-type: none"> <li>Meeting objectives in plan</li> <li>Better customer satisfaction</li> <li>Trained staff</li> </ul>	Ongoing	Corporate Policy Team/CS Team Leader	<ul style="list-style-type: none"> <li>* Consultation complete</li> <li>* HR will pilot Contact Scotland software before rolling out to customer services</li> <li>* Six CSC team members attended West College Scotland for full day BSL course</li> </ul>	
	Keep abreast of developments in relation to the Scottish Social Security Agency (SSSA)	Joint working with the SSSA and internal services such as HSCP in order to implement co-location.	Dec-19	Revenues and Customers Services Manager/CFO	<ul style="list-style-type: none"> <li>Site visits have taken place regarding co-location.</li> <li>* Council and SSSA have agreed costings per head for any SSSA staff members to be located in the CSC.</li> <li>*ICT specification and equipment requirements have been established.</li> <li>*Health &amp; Safety templates for SSSA staff working in CSC have been completed.</li> </ul>	
CUSTOMER ENGAGEMENT	Use the website to communicate meaningful information to our citizens. Feed issues into the Corporate Web Group	Customer satisfaction improvements - customer expectations are managed better when targets are understood.	On-going	Revenues & Customer Service Manager/Corporate Communications	On Going	
SERVICE DEVELOPMENT	<ul style="list-style-type: none"> <li>*Develop Kana system</li> <li>*Implementation of web self service</li> <li>*Mapping integration for location based fault reporting with corporate GIS system</li> <li>*Develop further online payments</li> <li>*Revise the range of services available via the council website</li> <li>*Development of citizen access for council tax</li> </ul>	<ul style="list-style-type: none"> <li>*Increased range of services available via Web Self Service</li> <li>*Customers are able to book and pay for services online</li> <li>*Customers are able to conduct council tax administrative requests via the council website</li> <li>*Customers can access multiple services via a single sign on (MyAccount)</li> <li>*Reduces workload for customer services</li> <li>*Streamlines processes</li> <li>*Quicker service notification of new/updates to cases</li> </ul>	Oct '19	Revenues & Customer Services Manager & ICT	<ul style="list-style-type: none"> <li>* Business case approved March 2018 and implementation is under way. Core system upgrade applied. Issue identified with integration between Kana and Uniform System. Requirement to resolve prior to "go-live" of any new services. Work being completed in tandem with upgrade process.</li> <li>* GIS issue has still to be incorporated for use by Customer Service staff and relevant systems to be fully tested</li> <li>* CA - R: Initial implementation complete – QA testing by service identified issues that prevented implementation. Upgrade from supplier is expected in October '19 to resolve these issues. Milestone chart currently being devised to identify launch date.</li> </ul>	SLIGHT SLIPPAGE
	CSR's to take appointment calls for marriages and followed by deaths	Calls handled by CSR's	Mar '20	Customer Services Team Leader & Registrar	<ul style="list-style-type: none"> <li>*Birth Registration calls handled by CSR from June 19</li> <li>*Await upgrade of Opti Time booking scheduler rather than using Outlook</li> </ul>	
	Agree escalation process where individuals repeatedly fail to meet required standards.	<ul style="list-style-type: none"> <li>*Improved customer service delivery</li> <li>*Improvement in scoring of individual's quality managed calls</li> </ul>	On-going	Customer Services Supervisor/Support Officer	Procedure developed and implemented	COMPLETE

	Transfer of Registration Services to Customer Services	Knowledge transfer of operational processes and legislation	Apr '19	CS Supervisor/Principal Benefits and Customer Services Officer	Complete	COMPLETE
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	2017/18	2018/19
Calls Presented	34256	29192
Calls Answered	25859	23,741
Customers Interviewed	11494	11859
Emails Received	4381	3631
Total Contacts	41734	39231

### Revenue & Benefit MI

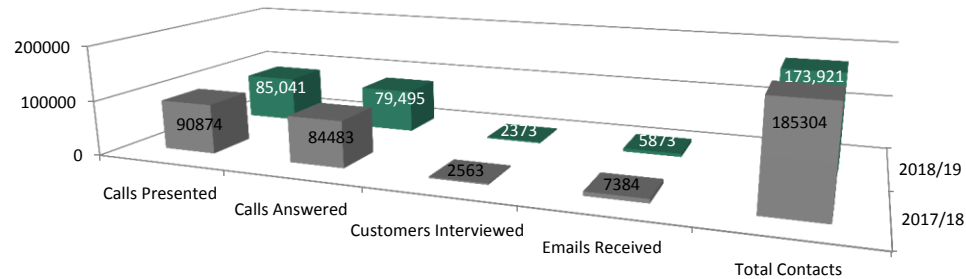


#### What does the MI show (annual)?

- \* Calls presented has decreased by 15%. This is largely contributed to by a 20% decrease in Housing Benefit calls
- \* Customers interviewed has increased by 3%
- \* Abandoned call level has decreased from 25% last year to 18% this year. This exceeded the 20% target set.
- \* Housing Benefit emails received has decreased by 17%
- \* Total contacts has decreased by 6%
- \* The team lost 3 experienced staff members in Dec 18. These vacancies were filled mid January 19 but they only handled CTX enquiries for the first 8 weeks when benefit training was then delivered.

	2017/18	2018/19
Calls Presented	90874	85,041
Calls Answered	84483	79,495
Customers Interviewed	2563	2373
Emails Received	7384	5873
Total Contacts	185304	173,921

### Other Services MI

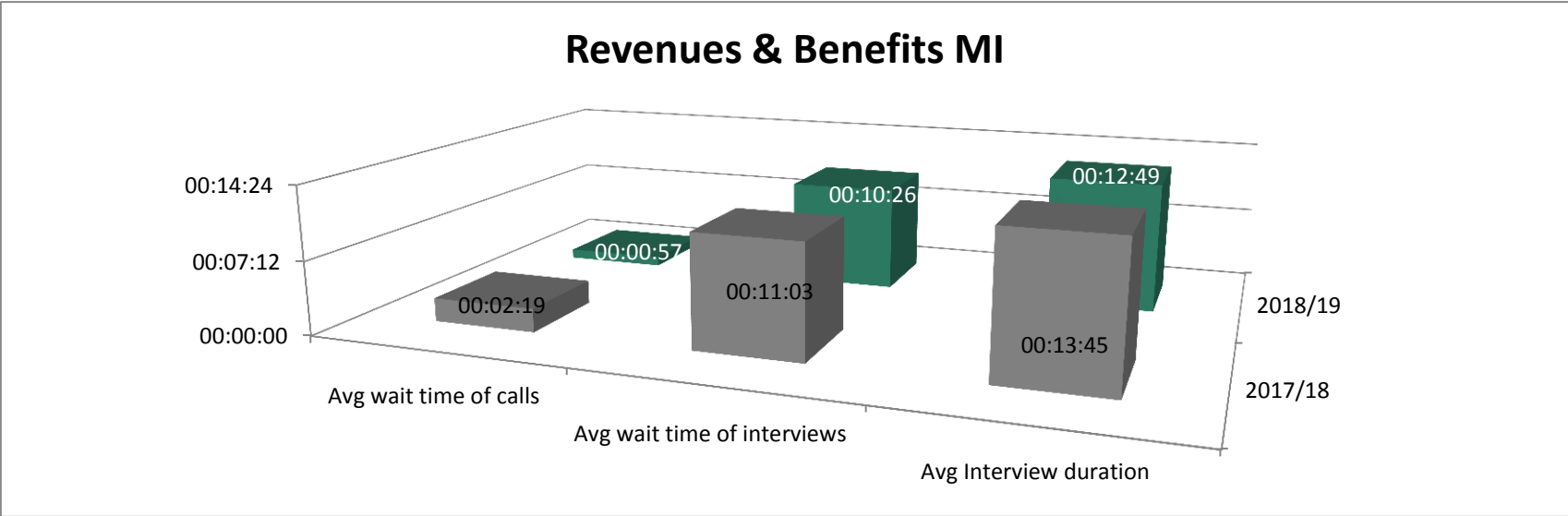


#### What does the MI show?

- \* Calls presented for all other non R&B services has decreased by 7%
- \* Calls handled for all other non R&B services has increased slightly to 94%
- \* 6% of calls remain unanswered - this is a slight improvement to last year with the target set at 7%
- \* Interviews has decreased by 8%. This will be largely contributed to free school meals being automatically awarded to P1 - P3
- \* Emails have decreased by 26%
- \* Total contacts has decreased by 7%.

Usage of the mobile app and website has decreased by 22%. 1705 enquiries were submitted in 2018/19 compared to 2197. These enquiries were originally made via the CSC. (The decline in enquiries is perhaps due to Apple users being unable to use the mobile app due to technical problems (since August 18)).

	Avg wait time of calls	Avg wait time of interviews	Avg Interview duration
2017/18	00:02:19	00:11:03	00:13:45
2018/19	00:00:57	00:10:26	00:12:49



	Avg wait time of calls	Avg wait time of interviews	Avg Interview duration
2017/18	00:02:19	00:07:57	00:06:27
2018/19	00:00:57	00:08:16	00:07:43

